

Job Costing Screens Defined

Manage Job - Buttons Explained

Manage Job

Search Memo Attachments Create Reminder **Info** Workflow Ready For Invoice Functions View Doc Print Doc Print Print Reports Save Close

JOB1083 NotStarted The Crossing Days to Completion: -14

Header

Basic Filter Functions Date Details Address Shipping / Link Progress Custom

JOB1083 CROSSING QT316 Short Description: Toone - Concertina Louvre (792) Team: [Green Box]

Completed: 0% [Green Arrow] 0% [Checkmark] Reference: 7928 [Alerts]

Charge Up (SC): [Checkmark] Assembly: [] Order No: MG260501

Prepriced (CTC): [] Internal Job: [] Sales Rep: DEALER

Sub Job Link: [Dropdown] Status/Position: [Dropdown]

Comment: [Text Area] Asset Item: [Dropdown] L: [Checkmark] [Eye Icon] [Download Icon]

Manage Sales Docs Purchase Docs Scheduling

Job Lines Planned Time Job Line History Sub Job Link BOM Links Notes

Page 1 of 1 Remove Paging: [] 1 Manage line A Cost To Company B Scope Creep C Quote 2 Job Detail 3 Line History Inventory Overview

#	To Inv	Notes	Line Type	QT No	Job Line Item Description	B-Status	Employee	Unit Sell	Days Req	Est. Qty	Budget Qty	Actual	Balance
1	[Blue Arrow]	[Icon]	Quote	QT316	Rain Sensor	[Red Triangle]		520.00	-21	1	1	0	1
2	[Blue Arrow]	[Icon]	Quote	QT316	Concertina V2 - Extrusion ...	[Red Triangle]		549.90	-21	1	1	0	1
3	[Blue Arrow]	[Icon]	Quote	QT316	Concertina V2 - Extrusion ...	[Red Triangle]		630.50	-21	1	1	0	1
4	[Blue Arrow]	[Icon]	Quote	QT316	Concertina V2 - Extrusion ...	[Red Triangle]		665.60	-21	1	1	0	1
5	[Blue Arrow]	[Icon]	Quote	QT316	Concertina V2 - Extrusion ...	[Red Triangle]		982.80	-21	1	1	0	1
6	[Blue Arrow]	[Icon]	Quote	QT316	Concertina V2 - Ring Bea...	[Red Triangle]		850.20	-21	2	2	0	2
7	[Blue Arrow]	[Icon]	Quote	QT316	Labour Setup	[Red Triangle]		80.00	-21	20	20	0	20
8	[Blue Arrow]	[Icon]	Quote	QT316	Labour Technician	[Red Triangle]		150.00	-21	10	10	0	10

Info

This screen is used to add and manage **internal notes for a job**.

- Enter notes in the main text area (with formatting options available)
- **Save** to store notes against the job
- **From Template** to insert **pre-set templates**
- **Print Notes** to include notes in printed documents
- **Close** to exit

Workflow

This screen allows you to control how the Job Workflow overview is displayed, helping you plan and track jobs over a selected time period.

Ready for Invoice

When selected, it simply adds a **thumbs-up icon** to the job in the results grid, providing a clear visual indicator that the job is complete and ready for billing.

Functions

The **Functions** tab provides access to a range of additional actions that can be performed on a selected job. These are typically used for maintenance, updates, or managing specific job settings.

View Doc	When you select a document in the Sales Doc or Purchase Doc tab and click View Doc , the document will open in a new screen.
Print Doc	When you select a document in the Sales Doc or Purchase Doc tab and click Print Doc , it will open a print selection screen. From there, click Continue to either print or email the document .
Print Reports	The Print Reports button provides a dropdown list of available job reports. Select the required report (e.g. Job Card, Job Analysis, Cost Report), and it will open ready for printing or review. This allows quick access to different reports related to the selected job.

Manage Job - Tab Explained

Basic Tab Overview

The **Basic** tab provides a high-level overview of the job and contains the key fields required to manage and update core job information.

The **Basic tab** is used to:

- View and update key job details
- Track job progress and status
- Assign responsibility and references
- Capture essential operational and administrative information

It acts as the central point for managing the most important aspects of a job before moving into more detailed tabs (such as Dates, Address, or Progress).

The screenshot displays the 'Manage Job' window with the 'Basic' tab selected. The interface includes a top toolbar with icons for Search, Memo, Attachments, Create Reminder, Info, Workflow, Ready For Invoice, Other, View Doc, Print Doc, Print Reports, Save, and Close. Below the toolbar, the job details are summarized: Job Number: JOB4694, Customer Name: ImraanTotal Marketing, Days to Completion: -1143, and Job Status: Started. The main area is divided into a left sidebar with a tree view (All Job Lines, Stock, Service, Custom, Tasks) and a central form. The form has tabs for Basic, Filter, Functions, Date Details, Address, Shipping / Link, and Progress. The 'Basic' tab is active, showing fields for Job ID (JOB4694), IS1, QT500403, Short Description, Reference, Order No. (x), Sales Rep. (CO), Status/Position, Asset Item, Completed (0%), Charge Up (SC) (checked), Prepriced (CTC) (unchecked), Sub Job Link, and Comment. There are also checkboxes for Assembly and Internal Job, and a Team field.

Completed	This controls the overall progress of the job • Can be updated manually to reflect how far along the job is • Helps with tracking timelines and reporting The small controls beside it allow for quick adjustments without typing
Charge Up (SC) Tick	When ticked, this indicates the job is chargeable to the customer
Assembly Tick	Used when the job involves building or assembling components
Prepriced (CTC) Tick	Indicates the job has fixed or predefined pricing , meaning costs are not calculated dynamically
Internal Job Tick	Marks the job as internal use only , meaning it is not billed to a customer
Sub Job Link	Allows you to connect this job to another related job , useful for larger projects split into parts
Comment	Used to add important notes, instructions, or context • This is useful for keeping communication clear between users or teams
Short Description	A brief summary of the job for quick identification
Reference	Any additional identifier or note provided by the customer or internally
Order No	Links the job to a customer order or purchase order
Sales Rep	The person responsible for the sale or account
Status/Position	Shows where the job sits within the workflow or process stage
Team	The group or department responsible for completing the job
Asset Item	Links the job to a specific asset or item, if required • Includes lookup options to quickly search and attach records

Job Percentage Complete

Manage Job

Search Memo Attachments Create Reminder Info Overview Ready For Invoice Other View Doc Print

Job Number: **JOB4686** Customer Name: **Sound and Security** Days to Completion: **122** Job :

Header

Basic	Filter	Functions	Details	Address
JOB4686	SAS	OT500364	Short Description:	Task detail
Completed: 97%		-> 97% ☒	Reference:	
Assembly: ☒			Order No:	Order458
Charge Up: ☒			Sales Rep:	
Prepriced: ☒			Status/Position:	
Sub Job Link: JOB4669			Trackit Item:	

Manage Documents Orders Coordinate

Job Lines Line History All Sub Job Link BOMs Notes

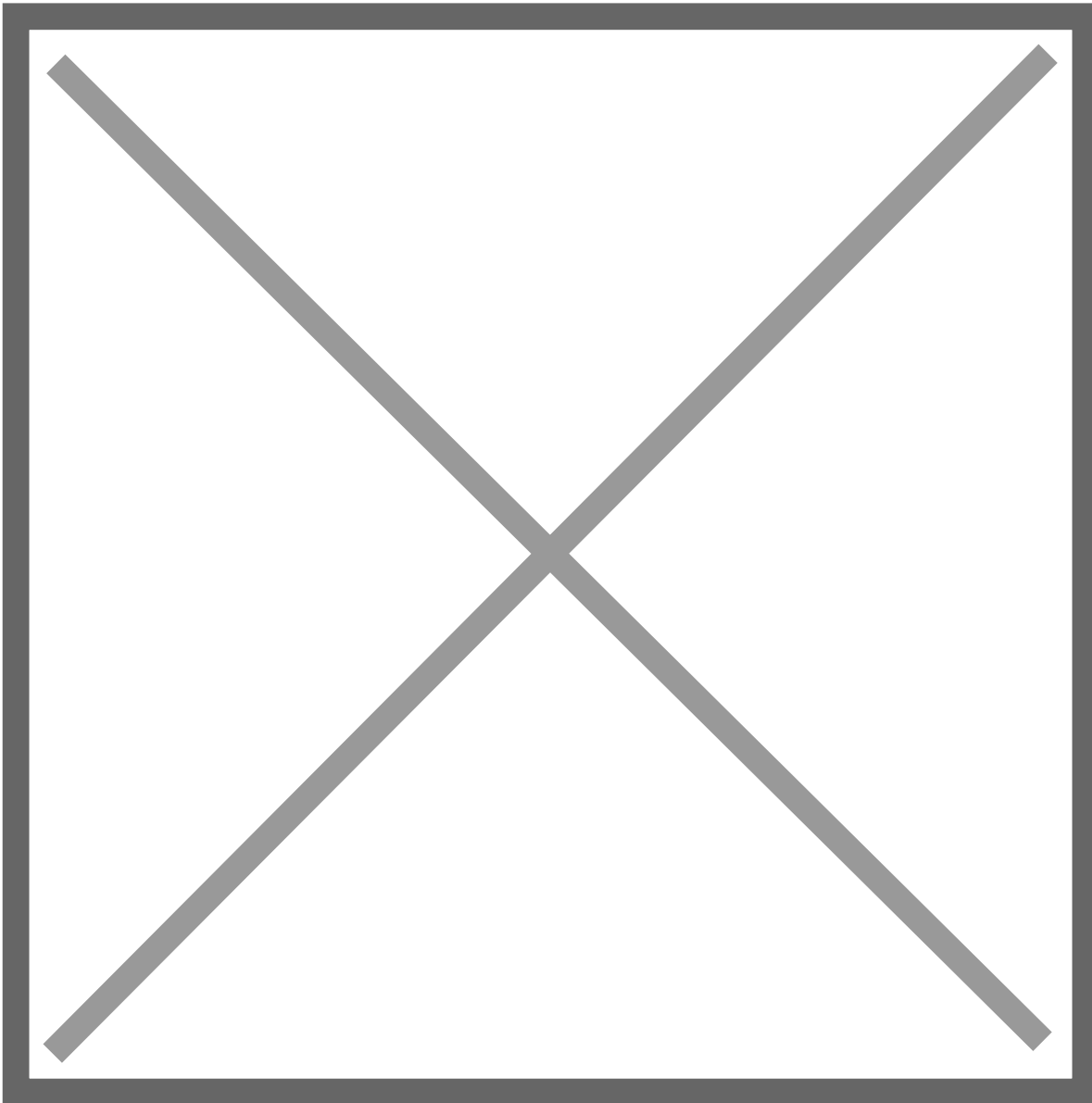
Page 1 of 1 Remove Paging: Manage Job A Cost to Company B Scope Creep C Quote

The job completion percentage is calculated by comparing the **total budgeted quantity** to the **total actual quantity completed**.

This value is displayed in blue; however, it may not always accurately reflect the true completion status. In such cases, the user may need to adjust it manually.

The percentage can be updated by clicking the **arrow button** or selecting a value from the **dropdown menu**.

If the **tick box is enabled**, the percentage will automatically update each time the job is saved. If the tick box is disabled, the percentage will remain unchanged and must be updated manually by the user.



A single button is available to **update the completion percentage across all jobs simultaneously**.

This function will only apply to jobs where the **tick box is enabled**. Jobs with the tick box disabled will **not be updated automatically** and must be adjusted manually by the user.

Filter Tab Overview

Manage Job

Search

Memo

Attachments

Create Reminder

Info

Workflow

Ready For Invoice

Other

View Doc

Print Doc

Print Reports

Save

Close

Job Number: JOB4694Customer Name: ImraanTotal MarketingDays to Completion: -1143Job Status: Started

Header

All Job Lines

Stock

Service

Custom

Tasks

Basic

Filter

Functions

Date Details

Address

Shipping / Link

Progress

Cu

Item Code:

Employee:

All

Description:

Line Type:

All

Department:

All

Line Reference:

Function:

All

Line Status:

All

Req Date From:

Req Date To:

Group Name:

Quote No:

Show Locked Lines:

Update Lines

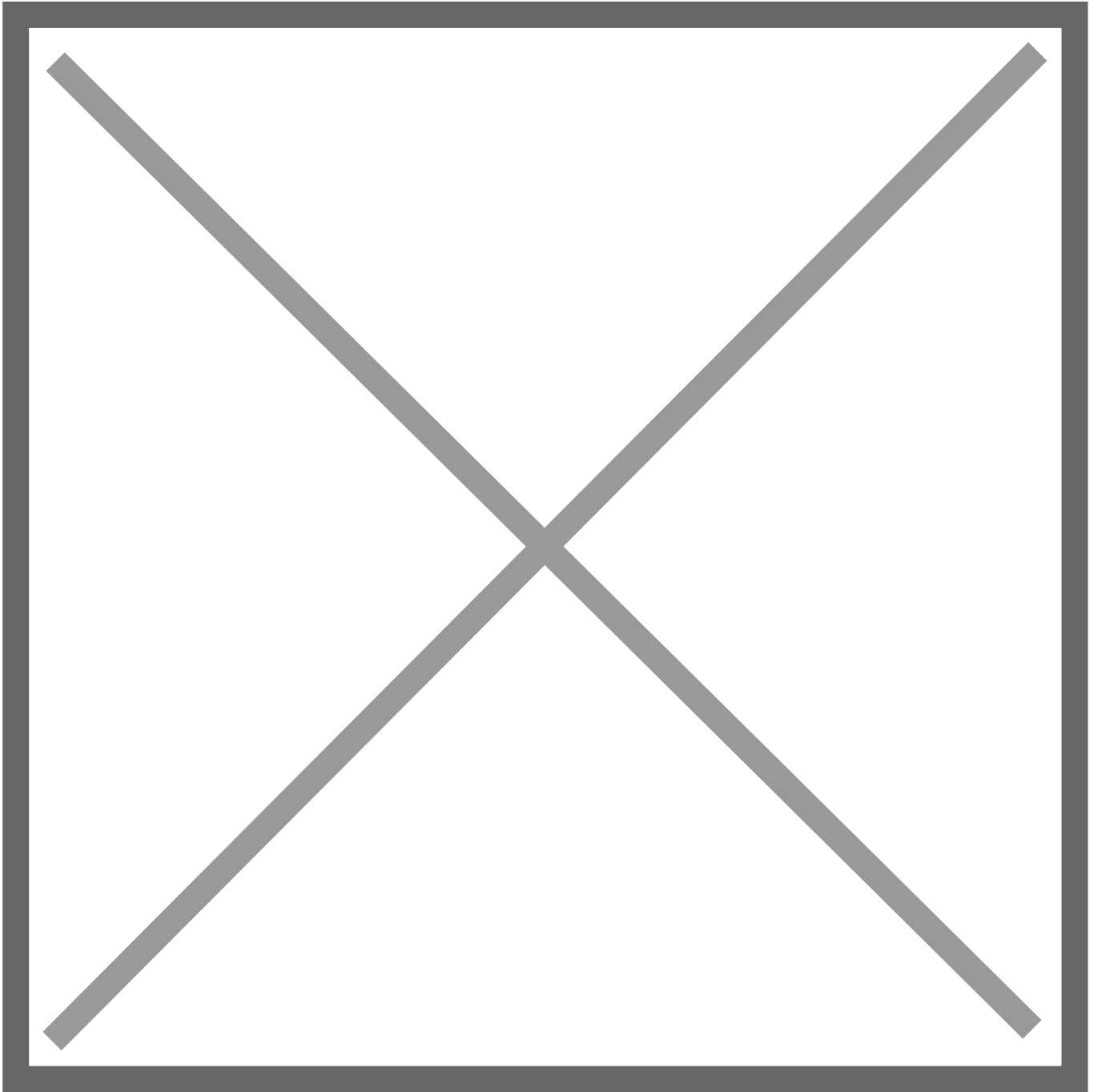
Clear Filter

Delete Range

Item Code	
Description	
Department	
Function	
Req Date From and To	
Quote No	
Show Locked Lines Tick	
Employee	
Line Type	
Line Reference	
Line Status	
Group Name	
Update Lines	
Clear Filter	
Delete Range	

Progress Tab Overview

The **Progress tab** provides a summary of job performance, with totals calculated based on values entered in the **Scheduling tab** (task activity groups).



Total Sell Budget	• This value is initially populated when a quote is promoted to a job. • It represents the total sell value (excluding) from the quote. • This figure can be manually updated if required.
Total Cost Budget	• Also populated when the quote is promoted to a job. • Represents the total cost value (excluding) from the quote. • This figure can be manually updated.

Activity Job Progress %	• Calculated as the sum of percentage completion entered in the Scheduling tab for task activity groups. • Reflects overall job progress.
Activity Sell Budget Sum	• The total of all sell values assigned to task activity groups in the Scheduling tab.
Invoiced to Date	• The total value of all processed invoices. • Displayed as the sell value excluding GST.
Potential to Invoice	• Calculated as: Activity Sell Budget - Invoiced to Date • Indicates remaining value available to invoice.
Invoiced % to Date Sum	• The total percentage already invoiced, based on percentages entered on task activity lines.
Value to Invoice	• The calculated value ready to be invoiced, based on the invoicing percentages selected on task activity lines.
Total Hours	• A manual entry field used to record the total hours required for the job.

Manage Job - Notes Tab

The Notes for Manage Job has been upgraded to the new text format

Manage Job

Search

Memo

Attachments

Create Reminder

Info

Workflow

Ready For Invoice

Functions

View Doc

Print Doc

Print

Print Reports

Save

Close

JOB1074StartedBarcodeDays to Completion: 6

All Job Lines

Stock

Service

Custom

Tasks

Basic

Filter

Functions

Date Details

Address

Shipping / Link

Progress

Custom

JOB1074BAR001QT305

Short Description:Test pricingTeam:

Completed:40%0%☒

Reference:

Charge Up (SC):☐Assembly:☐Order No:89

Prepriced (CTC):☐Internal Job:☐Sales Rep:DEALER

Sub Job Link:

Status/Position:

Comment:

Asset Item:

Manage

Sales Docs

Purchase Docs

Scheduling

Job Lines

Planned Time

Job Line History

Sub Job Link

BOM Links

Notes

SavePrint

B*U*A:≡≡≡¶¶¶¶¶¶¶

note

Characters : 4

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